

Union Square Civic Advisory Committee  
Wig Zamore, Chair and Anne Tate, Co-Chair  
93 Highland Avenue, Somerville, Massachusetts 02143

April 28, 2014

Nancy Busnach, Chair  
James F. McCarthy, Treasurer  
Iwona Bonney, Secretary  
Michael Dwyer  
William F. Gage  
Somerville Redevelopment Authority  
93 Highland Avenue, Somerville MA 02143

Dear Ms. Busnach and Somerville Redevelopment Authority (SRA) Members,

This “Chair’s Report” addresses the Union Square Civic Advisory Committee (CAC) activities to date, through the recommendation of four master development teams, out of nine, for further consideration as master developer for twelve plus acres on seven redevelopment parcels designated in the Union Square Revitalization Plan (October 2012) and the Union Square Request for Qualifications (December 2013).

*Though I had intended a revised and potentially fuller report than the “Draft Report” submitted April 17 2014, the CAC members did not have any serious concerns with the previous Draft Report and it is as full of detail as I can make it and still have it true to the CAC consensus on the nine development teams during our public master developer short list selection meetings. I thank you very much for allowing CAC a full week plus this past weekend to consider and reflect upon the Draft Report. It is important to me as Chair to make sure that the CAC members have the opportunity to fully consider any representations of our collective work. In lieu of greater detail on each development team and the CAC responses to them, which in each case represent a wide range of individual member reactions but group consensus, I have appended, as examples only, the notes of two CAC members who were kind enough to submit their individual thoughts to me. I have corrected a few typos but otherwise left these informal opinions of two individual CAC members intact. We very much look forward to meeting with the SRA on May 8<sup>th</sup> and to working with the SRA and City of Somerville elected officials and key staff members over the next several years. Union Square’s evolution is a wonderful opportunity for the whole diverse community of Somerville.*

The Union Square CAC, including the Chair and Co-Chair, is composed of twenty community members appointed by Mayor Curtatone and representing a broad array of Somerville citizens, interests and orientations, each as named and described in Attachment A, “Union Square Community Advisory Committee Selected”. The primary knowledge brought to bear by the CAC is a deep understanding of Somerville and Union Square, as well as their populations and their physical, social and small business environments. The CAC has members who were already familiar, to varying degrees, with lead members of all of the competing master development teams, their proposed designers and other consultants, and their work. CAC members have previously devoted literally thousands of hours to processes that underly and relate to Union Square redevelopment - including the SomerVision Comprehensive Plan, Union Square zoning, the Route 28 Grounding Study, the Green Line Extension project and to other recent local planning efforts. All of these underly and form the foundation for Union Square’s exciting revitalization efforts.

To date the CAC has had eight meetings, the first just a “meet and greet” each other, the second devoted to city planning and Union Square orientation. Three subsequent meetings were devoted to master

developer candidate presentations, similar to those seen by the Somerville Redevelopment Authority. The CAC were also encouraged to attend a Union Square infrastructure update. The last two meetings, April 2<sup>nd</sup> and 8<sup>th</sup>, were spent on discussion of strengths and weaknesses of the master development teams and proposals, and creation of a short list for further consideration. Notes for the first six CAC meetings and links to the presentations are on the city web site as reproduced in Attachment B. Public attendance at the CAC meetings has been robust, with hundreds of participants and numerous public comments before, during (as time allowed) and at the end of each meeting. A large majority of CAC members have attended the meetings, with quorum never an issue, and done significant homework to inform their comments and decisions. Discussion of the strengths and weaknesses of the master developer teams during the last two meetings, notes to be posted shortly, included spoken participation by most CAC members.

In considering the master developer teams, the CAC was especially cognizant of the SomerVision Comprehensive Plan long term goals - 30,000 new jobs; 125 new acres of publicly accessible open space; 6,000 new housing units (1,200 affordable); 50% of new trips by transit, walking or bicycling; 85% of new development in transformative areas, including the 14% or so proposed for 60 redevelopable acres in Union Square and Boynton Yards. The CAC is keenly aware that Somerville has by far the greatest imbalance of workforce and jobs out of any of Massachusetts' 351 municipalities, being short of live work balance by over 5,000 jobs per square mile. Therefore it is imperative that Union Square and other transformative districts be required to reach their jobs goals. At the same time the CAC heard many public comments about the need to keep Somerville's diversity and equity issues in focus, including local hiring, and also comments about the importance of paying attention to the city's strong sustainability and energy goals. Environmental issues of concern include the need to lessen and mitigate both transportation related air pollution (an old issue raised many times in the Green Line hearings) and flooding of low lying land.

Many on the CAC (and in the audience) are very strongly committed to a Union Square future which preserves the best of the old, including our diverse small businesses, some of which may have to be the beneficiaries of relocation if they cannot be preserved in place, and our artisans and emerging "maker space" entrepreneurs. The CAC briefly reviewed other urban land transformations and district redevelopments in the Boston region - such as Kendall Square, University Park, North Point, Fan Pier and Pier 4, etc. As a result the CAC is aware of the length of time and the pace of redevelopment in such 10 to 50 acre districts. Urban land transformations take decades in the best of circumstances and individual development teams are rarely able to develop more than 100,000 square feet of new building space per year, averaged over economic cycles. In general, the CAC feels that the city and SRA choice of seven parcels that cover twelve plus acres, spanning from the new Union Square Green Line Station through the heart of the Square, is extremely wise as it will motivate design and development that spreads the benefit of our new transit to the full mixed use business district and the neighborhoods beyond.

With regard to the master developer teams, it is clear that each of the nine teams could contribute quite skillfully to future redevelopment efforts of one type or another in Somerville. The strength of the pool of nine speaks to the strength of Somerville itself and to the benefit of good transit that is on the way. The following abbreviated discussion gives highlights of the CAC discussion and thought process. The CAC discussion was comprehensive, lasting over three and a half hours, though the selection itself took considerably less time. All discussions were, of course, fully public with no restricted "executive sessions". When the CAC members were each asked to list their top three choices, three groups of three emerged. The top group included Gerding Edlen, Federal Realty - National Development and the Abbey Group. The second group included US2 (Magellan and Mesirow), Fallon Company and HYM. The third group included Samuels, Trinity - Davis, and Redgate. US2 was selected in a second single choice CAC consideration of the second group in order to assure a full short list of master developer candidate teams.

**Gerding Edlen** was considered to be the team with the greatest commitment to sustainable development. No other team was close in this regard. They also showed a history of projects executed at scales that would be compatible with Union Square and that sensitively incorporated local arts and crafts. There was limited concern that one of their housing projects may not have been aimed at a diverse population.

**Federal Realty and National Development** were familiar to most CAC members because of their accomplished mixed use work at Wellington Circle and Assembly Square. Their mix of skills and experience is favorable. Their integration with local on the ground built fabric and existing small businesses needs to be assured. Similarly there is some concern about putting too many of Somerville's eggs in one basket.

**Abbey Group** by consensus did not do well with some aspects of presentation. The CAC liked their integrity and was especially impressed by their extraordinary entrepreneurship in tackling and accomplishing both Landmark Center redevelopment and Mass MOCA, among other projects. Abbey were considered most realistic with regard to their own weaknesses. Their designers and consultants were considered exemplary.

**US2** had the most experience with large scale urban development and finance. Though their larger developments are too high and "big city" to fit well in Somerville, they exhibited accomplishment at multiple scales and in various challenging situations. Their urban designers and other local team members are considered broadly skilled. With their size there is some question about our relative importance.

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**Fallon Company** was considered to have given a great presentation, by Joe Fallon himself, including the temporary uses and appropriate attention getting tactics to launch the Fan Pier project. Fallon showed an understanding of the new economies driving the South Boston Waterfront and Fort Point Channel district. There was some concern over integration of old and new scales in Union Square's redevelopment.

**HYM** - Thomas O'Brien also gave a great presentation, including his understanding of the importance of integration of transit into new mixed use. People appreciated his efforts on the Somerville portion on North Point and were favorably struck by the suggestion of a large central green space in Union Square. There was concern regarding the large new developments in HYM's pipeline at North Point and Government Center.

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**Samuels** showed excellent redevelopment skills in the Fenway area of Boston including the integration of smaller pre-existing businesses. Their corporate scale and regional experience fits well with Somerville. There was concern regarding the strong retail and housing emphasis of many of their developments.

**Trinity Davis** showed excellent mixed income housing skills, a very relevant research and development above retail project at Mass General and sensitive adaptive re-use and design in Lowell. Nevertheless, the CAC felt that housing was overemphasized relative to Somerville's need to develop local jobs.

**Redgate** has recent transit oriented development experience on Lowell Street in Somerville, and an experienced team that worked together at Spaulding and Slye. Their efforts to permit and entitle complex urban mixed use at both Fan Pier and North Point were impressive. There was some concern that they may not have fully built out many projects with the total square feet proposed for Union Square.

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The CAC process to date could not have occurred without the strong and skilled assistance of Ed O'Donnell and Amanda Maher, both of whose contributions have been outstanding.

With Best Regards, Wig Zamore

## Attachment A

# Union Square Community Advisory Committee Selected

Posted by boston.com January 15, 2014 10:00 AM

*The following was submitted by the City of Somerville:*

A group of 19 community members, local advocates and business owners has been selected for The Union Square Community Advisory Committee that will advise the City on strategic planning decisions and development in the Union Square area over the next two years, and Mayor Joseph A. Curtatone announced the selections for the committee today.

The committee will tackle a variety of topics affecting Union Square including economic development, land use, housing diversity, transportation, open space, quality of life, and preservation of the squares character. The committees work will build upon the state-approved urban renewal plan for the square, realize transit-oriented and community development opportunities brought by the coming Green Line Extension scheduled to open in 2017 in Union Square, and work in concert with a forthcoming, in-depth roadway and infrastructure improvement plan being prepared by international consulting firm Parsons Brinkerhoff with community input.

The committee will also help the City evaluate applicants who respond to the Request for Qualifications (RFQ) for a master developer partner that will work with the City, the Somerville Redevelopment Authority, current property owners and community members to design and implement the redevelopment of the seven development blocks identified in the Union Square Revitalization Plan. The master developer partner will be selected by the criteria listed in the RFQ with the aim of achieving the community's goals set forth in SomerVision and preserving Union Squares history and unique character. Responses to the RFQ are due Jan. 31, 2014.

Once a master developer partner is selected, the committee will act as a sounding board for the Master Developer. The committee will help shape proposals that will then be brought forward for full public review, providing the community a dialogue with the developer to help determine a strategy that ensures the continuity of this unique and vibrant square, while making sure all the pieces come together in a way that creates community-driven, sustainable and strategic economic development.

This committee appropriately reflects Union Squares identity, because the work charged to the committee focuses on enhancing the identity of the square: preserving what we love now about it and shaping its identity for the future, said Mayor Joseph A. Curtatone. This is only the first of the public processes around the redevelopment of specific blocks of Union Square. The community has set its high standards and goals for Union Square. They are written down in SomerVision. We will hold the master development to those standards.

This committee will help us select the right developer with the right vision and shape each proposal that is submitted to the City. Any proposals must also go before the Planning Board in a public hearing, providing further public input, and there will be ample opportunity for the public to stay involved in the process from start to finish via design and community meetings. How Union Square

evolves while retaining its unique character and identity will be beholden to the people of Somerville and their vision for the square.

The City of Somerville publicized in October that applications were being accepted for the Union Square Community Advisory Committee. Members of the committee were selected to provide a breadth of experience and representation of those who live, work and play in Union Square. To maintain independence and objectivity, none of the committee members are currently employed by the City outside of a representative of the Somerville Arts Council, who will be acting on behalf of the arts community. Nor are any members currently property owners within the seven development blocks.

The members of the Committee consist of long-time residents, representatives from the local business community, local advocates, and members of the arts, creative economy and the maker movement, who bring a range of relevant expertise and knowledge to the committee.

Somerville resident and community advocate Wig Zamore will serve as chairman of the committee. An MIT-trained urban development expert, Zamore is a founding and active member of both the Mystic View Task Force and Somerville Transportation Equity Partnership.

The arrival of the Green Line in Union Square brings with it the opportunity to capitalize on the full potential of Somerville's historic crossroads of commerce, while protecting the aspects of Union Square we cherish as a community, said Zamore.

Union Square needs an upper-story base of office, research and developments jobs that would support the lower-story job base of main street retail, balanced with additional housing, including affordable housing, open space, and room for the creative arts and culture that already calls the square home. Balancing these needs as we create a sustainable, mixed-use and transit-oriented neighborhood is a task that this community will take on to ensure Union Square becomes a true local success story.

The additional 18 committee members were selected to provide a range of skill sets and perspectives. The full list of members is below.

We are already seeing development pressure in Union Square and this committee is an important step in ensuring that coming development meets community goals, said Ward 2 Alderman Maryann Heuston. We all worked so hard to make the Green Line Extension a reality, but the next phase of our work is only just beginning. I am committed to working with this committee to both preserve what we all love about Union Square today and to ensure that the Union Square of tomorrow brings this community the jobs, housing diversity and commercial tax revenues that we want while bringing us more of the vibrant, walkable streetscapes that make Somerville not just a city but our home.

I am heartened that this community is determined to shape the future of this square carefully and with public input rather than to just leave it up to random developers, said Ward 3 Alderman Bob McWatters.

The depth of skill on this committee combined with the balance between residents, business owners and community activists should ensure that the master plans are reviewed from every angle. This is a rare opportunity for our city to make a significant, positive impact on our future. I look forward to being a part of this process and to hearing the proposals of this committee.

In addition to Committee chairman Wig Zamore, the Union Square Community Advisory Committee members include:

Joe Beckmann, co-founder of Progressive Democrats of Somerville and OutSomerville. Beckmann is a former Somerville Public Schools consultant.

Susan Callahan, Middlesex County Second Assistant Register of Deeds. Callahan is a former Somerville City Solicitor.

Robyn Champion, long-time Prospect Hill resident. Champion is a former professional transportation consultant and deputy director of Executive and Continuing Professional Education at Harvard School of Public Health.

Mike Dacey, founder of Repeat Press. Dacey is a representative of Fringe Union.

Erik Fellingner, Union Square Main Streets President of Board of Directors. Fellingner is a transportation planner.

Mimi Graney, Union Square Main Streets executive director.

Gregory Jenkins, the Somerville Arts Councils executive director.

Angelina Jockovich, co-owner of Casa B in Union Square. Jockovich is an architect by trade specializing in construction management, architectural design and sustainable design and is a native of Colombia.

Ken Kelly, co-owner of The Independent and Precinct in Union Square. Kelly serves on the Union Square Main Streets Board of Directors, is a member of the Somerville Chamber of Commerce and is an advocate on Union Square issues.

Shaina Korman-Houston, the Somerville Community Corporations project manager. [\[Note that Scott Hayman, the new Director of Housing for SCC, has replaced Shaina as the sitting SCC member. Wig\]](#)

Karen Mancini, Former Assistant Purchasing Director for City of Somerville.

Pat McCormick, is senior consultant for Public Consulting Group, former president of the Somerville Homeless Coalition board, and former CIO for the City of Somerville (2000-2004).

Erik Neu, resident, parent, and Union Square entrepreneur. Neu is a graduate of Somerville Academy for Innovative Leadership (SAIL) and is an independent management consultant.

Philip Parsons, principal at Parsons Consulting Group, formerly of Sasaki Associates, a leading international planning and design firm. Parsons specialties include comprehensive planning, urban design and planning, landscape architecture and LEED AP.

Molly Rubenstein, Artisans Asylums executive director.

Kat Rutkin, Somerville Local Firsts executive director.

Rebecca Schrumm, Somerville Chamber of Commerce Board of Directors Vice Chairman and Green Committee Chairman. Schrumm is a financial advisor.

Gordon Wong, resident. Wong is a graduate of the Somerville Academy for Innovative Leadership (SAIL), a data management specialist and consulting director at Cervello, a technology consulting company.

The first committee meeting will be announced shortly. Meetings of the Union Square Community Advisory Committee are open to the public.

# Attachment B Union Square Redevelopment – City of Somerville Web Page

<http://www.somervillema.gov/departments/ospcd/economic-development/union-square-redevelopment>

The redevelopment of Union Square is regarded with the highest priority by Mayor Curtatone's administration. The City recently completed an over four-year process of developing new zoning to provide incentives for economic development, diverse housing, and the Arts community. The City owns several key sites including the former Kiley Barrel property at the intersection of Prospect and Somerville Avenue. The City is committed to using the development potential of these municipally owned properties to affect development in a positive way and ensure a successful future for this vital and historic district of Somerville. Specifically, the planned development in Union Square aims to accomplish the following:

- Develop a local economy that emphasizes the tax base, service, residential, shopping, and employment needs of the community;
- Strengthen and market Union Square's image;
- Pursue urban design projects that create a unified square, are compatible on a pedestrian scale, define the area as a commercial center, and are aesthetically pleasing;
- Strengthen the role of public places and facilities;
- Maintain an efficient and thorough system of transportation infrastructure that balances public transit, private and commercial vehicles, bicycles, and pedestrians that is consistent with Union Square's image as a commercial center; and
- Develop a comprehensive parking management plan.

In December 2013, the City released a Request for Qualifications (RFQ) as an attempt to identify the most qualified development partner for Union Square. The full RFQ can be found here. Responses to the RFQ are due on Friday, January 31, at which time they will be released for public viewing. A 19-member Civic Advisory Committee has been established to advise the City on strategic planning decisions and development in the Union Square area over the next two years.

This page will provide continual updates regarding news, public hearings and events related to the development of Union Square. Be sure to check back often!

## Revitalization Plan

### Request For Qualifications (RFQ)

- The Abbey Group
- The Community Builders
- The Fallon Company
- Gerding Edlen
- HYM Investment Group
- KSS Realty/Redgate
- Magellan Development(US2)
- National Development/FRIT
- Samuels & Associates
- Trinity Union Square LLC

### Developer Presentations

- The Abbey Group
- The Fallon Company
- Gerding Edlen
- HYM Investment Group
- KSS Realty/Redgate
- Magellan Development(US2)
- National Development/FRIT
- Samuels & Associates
- Trinity Union Square LLC

## Acquisition And Disposition Parcels

- Map of all Parcels
- Disposition Block D-1
- Disposition Block D-2
- Disposition Block D-3
- Disposition Block D-4
- Disposition Block D-5
- Disposition Block D-6
- Disposition Block D-7

## SomerVision

### CAC Meeting Notes

- January 27th, 2014
- February 10th, 2014
- February 19th, 2014
- March 5th, 2014
- March 11th, 2014
- March 18th, 2014

### SRA Meeting Notes

The City of Somerville and the CAC will be hosting a series of three meetings in which master developer teams will have the opportunity to present to the community. At each meeting, three teams will present for approximately 25 minutes each. A brief Q&A will follow.

These meetings will be held as follows:

Wed., March 5, 2014 from 6-8 P.M.  
Cafeteria at the Argenziano School  
Presentations by: Trinity/Davis; KSS/Redgate; HYM

Tues., March 11, 2014 from 6-8 P.M.  
Cafeteria at the Argenziano School  
Presentations by: FRIT/National; Union Square Station Assoc.; Gerding Edlen

Tues., March 18, 2014 from 6-8 P.M.  
Cafeteria at the Argenziano School  
Presentations by: Samuels and Assoc.; Abbey Group; Fallon Company

 Printer-friendly version



# Attachment C Two Examples of Union Square CAC Member Notes

## MEMBER 1

### TRINITY: Cons outweigh Pros

#### Pros

- They have a large, pre-existing discretionary fund.
- ICON is a strong choice for architecture (Hamilton Canal in Lowell, Somerville Police HQ on Bow St.).

#### Cons

- At the presentation, they struck me as having one of the least collaborative-sounding approaches of all the candidates. They used words like “stick-to-itiveness” and “patience” rather than collaborative terms.
- They stated that there is “a place” for independent businesses but also said that their selection of tenants is driven by economics although “they understand subsidy sources for business that wouldn’t qualify as balance-sheet anchor tenants.” This is an honest response, but not necessarily the solutions-oriented approach we are looking for in terms of neighborhood businesses.
- While ICON is a strong choice, they were the far and away the most impressive part of the presentation and overall response and struck me as window-dressing on an otherwise very corporate and Private Equity-driven approach.

### REDGATE: Cons outweigh Pros

#### Pros

- Individual in charge of “ground space” and the “public realm”
- At North Point, they exceeded their required green space in order to solve water issues as well as to orient to and retain space for a future extension of the Community Path. This shows flexibility and creative problem-solving.

#### Cons

- They came off as “too rehearsed”
- Sample developments are not impressive / a good fit
- OED indicated they do not have the financial backing to accomplish the work.

### HYM: Pros outweigh Cons

#### Pros

- They stated they are open to retaining one parcel entirely as open space.
- Involvement of the former Director of the Boston Redevelopment Authority and former Mayor of Cambridge indicates a strong understanding of the public process.
- They are already working with the GLX team at the MBTA for North Point
- They got portions of North Point re-permitted to allow for commercial space in the Somerville portion, which involved both Somerville and Cambridge in the negotiations.
- Strong reference letters.

- Developed North Point and the Government Center Garage with no votes against.
- More evidence-based and less straight-out sales-y than the Trinity and Redgate.

### **Cons**

- Former city officials give the potential for too much of an “inside baseball” approach.

## **FRIT: Cons outweigh Pros**

### **Pros**

- Stressed Brownfield remediation experience and experience with Mass. Contingency Plan (MCP)
- Mentioned creative and flexible solutions for tenants as a commercial landlord.
- Spoke to the future by orienting toward Boynton Yards.
- Clearly familiar with the Union Square neighborhood.

### **Cons**

- Neither Station’s Landing nor Assembly Row are projects that match the needs of Union Square and if they cannot adjust their approach the community is likely to be quite adversarial.
- Somerville already has “a lot of eggs in one basket”.
- Potentially too focused on Boynton Yards.
- Presentation by their design staff was very weak.

## **UNION SQUARE ASSOCIATES (CHICAGO): Pros outweigh Cons**

### **Pros**

- They have a “Community Engagement Specialist” and he has strong personal ties to Somerville
- The lead developer spoke sincerely to the underlying values of a project that need to be the primary driver. He spoke immediately to the fact that this is a “unique opportunity but it is not for the feint of heart”, which no other candidate expressed so clearly.
- “Out of town” developer is a potential advantage if project needs to be rescued (important to Boston/Somerville AND Chicago)
- Performing active outreach to the community (website, survey, meet and greet)
- Favorable feedback after speaking to a close friend who lives in their Lakeshore East development
- Spoke strongly to affordable housing and integrating historic architecture.
- Spoke to innovative solutions to retain long-term independent businesses as tenants at reasonable rents

### **Cons**

- Out of town may create potential barriers to process (although most of their team is local)

## **GERDING ELDEN (PORTLAND): Pros outweigh Cons**

### **Pros**

- LEED and “green” focus (uniquely situated among the candidates)

- Nearly 100% of their portfolio is Transit-oriented development
- Spoke strongly to “curating” the retail tenants
- “20 minute living” is a strong match for Somerville
- They are clearly committed to the type of project that Union Square is pursuing
- “Out of town” developer is a potential advantage if project needs to be rescued (important to Boston/Somerville AND Portland)

### **Cons**

- Overall, although their content was strong, it was a rather bland presentation and conversation, particularly the part led by the design team.
- Their renderings for other projects were unattractive and not at the proper scale for Union Square.
- Out of town may create potential barriers to process

## **SAMUELS AND ASSOCIATES: Pros outweigh Cons**

### **Pros**

- Manage their properties themselves, which will help to ensure that we don’t wind up overbuilt. They seem to view this more as a long-term professional services job as opposed to a “build and bail”.
- Focus on Biotech and Tech Startup tenants.
- Vertically integrated (Building, Planning, Finance); Design and Architecture are not integrated
- The architect they are presenting with lives in Union Square and they clearly understand the neighborhood very well
- Spoke intelligently to “Seeding the Neighborhood” and curating the businesses over time as the project develops over decades.
- Focus on artists and artisans matches the neighborhood

### **Cons**

- Work samples presented (Grove Hall and Barry’s Corner in Allston) not particularly impressive, although under different context.
- Cambridgeside and Fenway / Landmark are more similar in context but not anyone’s favorite projects.

## **ABBEY GROUP: Tie between pros and cons**

### **Pros**

- Later feedback from CAC: their selection of subcontractors and partners is outstanding. “They know quality.”
- Spoke of the job at hand as “protecting” Union Square
- Focus on Biotechs, Tech Startups, Healthcare
- Refreshing that they were not “overly-polished”
- Interesting comment on using second floors as zones for artisans to reduce their rents by taking them off the ground floor and out of retail spaces

### **Cons**

- Very underprepared for the presentation.

- Their role in Landmark, although further back in time, is a bad example, yet they bragged about it at length.
- They don't seem to know Somerville well (but seem eager to listen and learn)

## **FALLON: Tie between pros and cons**

### **Pros**

- Very informed about Somerville and Union Square
- Focus on events and using events to build a place
- Focus (in presentation) on scale, infill, and smaller buildings
- Strong visuals on how the parcels grow out over time, phased. Spoke to planning proactively for change and seeing it as a process over decades.

### **Cons**

- Focus on events is somewhat redundant with what Union Square already manages to do for itself
- Fan Pier not a strong example vs. what we are looking for.

## **MEMBER 2**

Hello Amanda, Ed, and Wig,

I'll be out of town for work and unable to attend tonight's CAC meeting. As we anticipated narrowing down the list of master developer finalists, please find my input for consideration below.

I'd like to reiterate the central point you have made, that all nine proposals were worthy of consideration and strong in different ways. I very much appreciate that the City determined that the public, the CAC and SRA deserved to hear from all nine teams over the course of 3 weeks.

Prior to our last meeting on 4/2 I reviewed my notes from reading the proposals and from hearing the nine teams in person on 3/4, 3/11 and 3/18, and scored each against the selection criteria. Following the 4/2 meeting, I reviewed the OSPCD selection criteria matrix (provided at the meeting) and weighted the ratings (disadvantageous, advantageous, highly advantageous) of the nine proposals. When I compared my ratings to the OSPCD ratings, I was pleased to find similar results for the top candidates.

Three of the nine candidates not only scored higher than the rest of the field but were also difficult to rank against each other. These three strong contenders (in no particular order) are Federal Realty Investment/National Development, Gerding Edlen, and the Fallon Company. Interestingly, while I liked many aspects of other proposals I found it hard to choose a fourth place contender. Among the runner ups I had trouble determining which of three (Trinity Union Square, HYM Investments, Samuels & Associates) would take the fourth spot on my list (which at this level differed somewhat from OSPCD ratings).

In response to my question at the last meeting, Wig suggested that in developing a short list, we might find a natural breaking point. For me this turned out to be three particularly strong

contenders. As a result I'm going to limit my comments below to why I found these three proposals to be the most compelling.

(In no particular order)

## **Federal Realty Investment/National Development**

### Development team

- Experience with large scale mixed use in a dense urban setting includes examples close to home and nationally that correlate to challenges in Union Square.
- Proven player in MA and in Somerville with Assembly Square experience including in areas of public private partnerships, brownfields, and community engagement.
- Financial capacity appears strong and this factor was effectively communicated in the proposal and presentation, describing capital as the 'basis of partnership.'
- Well-articulated ideas about Union Square's potential commercial value utilizing an illustration of neighboring community strengths and describing how to attract start-ups and innovation oriented employers, from exploiting and enhancing the gritty cultural strengths of Somerville to applying experience as innovation district landlord in Boston's Seaport District.

### Design team:

- Demonstrated depth of understanding across TOD, MBTA and GLX including a concise and thoughtful case made for changes to proposed Union Square T stop such as orientation and bridge to Boynton Yards.
- Design experience is broad and applicable including strong examples of public space, public art, and historic preservation. Good points made about Union Square design elements with regards to balancing and distinguishing between different transportation corridors, and the importance of scale and juxtaposition.
- Excellent examples for proven capability in public engagement and sustainable design.

### Complete Development team

- FRIT and National are proven partners in working with City of Somerville, SRA and public under challenging circumstances in Assembly Square and on other projects.

### Other factors

Well-structured written submission with clear links between experience and approach to criteria.

The 5 reasons presented as strengths (capital, product diversity, catalyst for development, local experience and proven capability) were backed up with information and made for a compelling pitch.

## **Gerding Edlen**

### Development team

- Excellent urban mixed use examples in Portland, OR and applicable local urban residential development in Boston's Fort Point Channel.

- Significant capital assets and letters of reference from major financial institutions.
- Demonstrated depth of experience in complex public private partnerships in Portland and Los Angeles and brownfield development in WA, CA and OR.
- Breadth of experience and emphasis in proposal and presentation on community engagement and attention to local needs and context.

#### Design team:

- Substantial breadth of design experience against GLX, MBTA, TOD and public space/art including ADD, VHB, Utile
- Public engagement experience, capability, and focus evident in proposal and well demonstrated in approach to presentation.

#### Complete Development team

- Enthusiastic letters of support from City of Portland commissioner, Metro Transportation District of OR and Friends of Fort Point Channel suggest excellent working relationships with municipal governments and community members.

#### Other factors

- Well organized written proposal drew lines between capabilities and criteria and thoughtful in person presentation with introductions to team members in room and powerful use of 10 design principles made real through specific leading edge examples.
- Aspirational goal to make '20 minute living real' in Union Square by enabling short commutes, diverse services within walking distance and 'preserving symbols that matter' created a rich vision of complementary objectives aligned to Somervision and what we love about Union Square today.
- Candid answers including perceived weakness of not being local and biggest challenge for master developer of approaching Union Square 'block by block.'

## **The Fallon Company**

#### Development team

- Relevant, local mixed use, TOD, brownfield experience with Fan Pier and other projects.
- Depth of local experience in public private partnerships with Fan Pier, Massport, and MA Convention Center Authority
- Substantial financial assets and letters of reference from numerous, prominent financial institutions.

#### Design team:

- Range of experience by Elkus Manfred in adaptive re-use and preservation, urban redevelopment with open space and public art and TOD.
- Cogent description of design challenges during presentation including need to make connections, link spaces, transform underutilized real estate and focus on infill.

#### Complete Development team

- Strong letters of support from key local organizations including Mass Port, MA Convention Center Authority, Harvard University and others are evidence of effective working relationships with Fallon and ADD.

#### Other factors

Demonstrated a better grasp of Somervision objectives and Somerville vibe than most teams describing the irregular street grid and grit of Union Square as characteristics worthy of preservation and elevation.

Presentation included excellent short video that captured key existing attributes and potential enhancements and thoughtful articulation of eight design goals well aligned to Somerville community objectives.

Thoughtfully described vision including need to prioritize pedestrians and bicycles over cars, cater to innovation workers with open space and coffee, and develop street level as place to eat, drink and play while living and working above.